



Access How Do I Guide

Access

Information and Referral

How Do I...?	Selections	Tips & Guidelines
Document a request for information	<ul style="list-style-type: none"> Click Create > Information and Referral... Enter Applicable data/values Click Save. Click Close. 	Information and Referral records are not stored on the Desktop. This information can only be accessed on the Referrals report.

Services Report

How Do I...?	Selections	Tips & Guidelines
Establish services report record	<ul style="list-style-type: none"> Click Create > Access Report Select Services Report from the Access Report Type dropdown field. Enter text on the Narrative tab. Add participants to the report on the Participants tab by selecting the Add/Edit button. This will open the Access Inquiry Search page. On the Access Inquiry Search page, complete the last name and first name fields. Click the Search button. <ul style="list-style-type: none"> For a match: Click the select link for the applicable person(s). For no match: If displayed, click the Close button on the Validation Errors web page dialog box on the Access Inquiry Search page. Click the Create button to access the Access Participant page. Enter all applicable data/values and click the Continue button. If potential person matches exist, the Potential Person Match page will display a list of participants that are an exact person match. To proceed with creating a new person, click the Close button on the page. To select an existing record, click the appropriate radio-button and then click the Continue button. The participant will be added to the Participants group box on the Access Inquiry Search page. Add additional participants by completing the last name and first name fields and repeating the step above. After all participants have been added and searched, click Add Participants. Click Continue. On the Access Report page, enter the applicable data/values. Enter the applicable data/values on templates, as appropriate. Click Close and Return to eWiSACWIS. 	<p>The Services Report type of Re-open Closed Case can be used to re-open a closed case.</p> <p>The Female Head of Household typically has the Relationship of Reference Person and Role of Report Name.</p> <p>You can add several related people to the report at once by expanding the Search Person outline to the listing of participants under the Related People subject. Click the Select link for each participant that applies to this report.</p> <p>You can use the Address Copy button on the Participants tab to copy one person's address to another participant's record.</p> <p>If you save/close a report before completion, reopen it from the Access Reports outline. If you do not see a pending report, click the Refresh button on the banner.</p> <p>If the Services Report is for a Relinquished Infant case, at least one participant on the "CW-Relinquishment" services report should be assigned a role of "Identified Child". The participant assigned a role of "Identified Child" will become associated with a checked "Relinquishment Case" checkbox after the report is screened in by the supervisor.</p>
Change Services Report to a Child Protective Services Report	<ul style="list-style-type: none"> On the Access Report page, select 'CPS Report' from the Access Report Type dropdown list. A message displays indicating the Services Report will be changed to a Child Protective Services Report. Click Yes to continue and create the CPS Report. On the Access Report page, enter the applicable data/values. 	Prior to a supervisor linking the report to a case, you can change a Services Report to a CPS Report and retain the access participants by changing the value in the Access Report Type dropdown field.
Screen in/out services report	<ul style="list-style-type: none"> On the Decision tab/Worker Recommendation box, click the applicable radio button (Screen in or Screen out). Enter the other applicable data/values. Click Save. 	A services report is assigned to the supervisor to make the final screening decision.



WiSACWIS Help Desk (866) 335-2180
helpdesk@wi.gov



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Child Protective Services Report

How Do I...?	Selections	Tips & Guidelines
Establish Child Protective Services Report record	<ul style="list-style-type: none"> Click Create > Access Report. Select CPS Report from the Access Report Type dropdown field. Enter text on the Narrative tab. Add participants to the report on the Participants tab by selecting the Add/Edit button. This will open the Access Inquiry Search page. On the Access Inquiry Search page, complete the last name and first name fields. Click the Search button. <ul style="list-style-type: none"> For a match: Click the select link for the applicable person(s). For no match: If displayed, click the Close button on the Validation Errors web page dialog box on the Access Inquiry Search page. Click the Create button to access the Access Participant page. Enter all applicable data/values and click the Continue button. If potential person matches exist, the Potential Person Match page will display a list of participants that are an exact person match. To proceed with creating a new person, click the Close button on the page. To select an existing record, click the appropriate radio-button and then click the Continue button. The participant will be added to the Participants group box on the Access Inquiry Search page. Add additional participants by completing the first name and last name fields and repeating the step above. After all participants have been added and searched, click Add Participants. Click Continue. On the Access Report page, enter the applicable data/values. Enter the applicable data/values on templates, as appropriate. Click Close and Return to eWiSACWIS. <p><i>Note: All tabs contain an Options list to access the CPS Report and notice templates.</i></p>	<p><i>The Female Head of Household typically has the Relationship of Reference Person and Role of Report Name.</i></p> <p><i>You can add several related people to the report at once by expanding the Search Person outline to the listing of participants under the Related People subject. Click the Select link for each participant that applies to this report.</i></p> <p><i>If a person is part of a report, but his/her name is unknown, when entering the report, log the first and/or last name as "Unknown". Be sure to update the correct Unknown, Unknown person record as additional information about the person is learned.</i></p> <p><i>You can use the Address Copy button on the Participants tab to copy one person's address to another participant's record.</i></p> <p><i>If you save/close a report before completion, reopen it from the Access Reports outline. If you do not see a pending report, click the Refresh button on the banner.</i></p>
Change Child Protective Services Report to a Services Report	<ul style="list-style-type: none"> On the Access Report page, select 'Services Report' from the Access Report Type dropdown list. A message displays indicating the Child Protective Services Report will be changed to a Services Report. Click Yes to continue and create the Services Report. On the Access Report page, enter the applicable data/values. 	<p><i>Prior to a supervisor linking the report to a case, you can change a CPS Report to a Services Report and retain the access participants by changing the value in the Access Report Type dropdown field.</i></p>
Screen in/out CPS report	<ul style="list-style-type: none"> On the Decision tab/ Worker Recommendation box, click the applicable radio button (Screen in or Screen out). Enter the other applicable data/values. Click Save. 	<p><i>A CPS report is assigned to the supervisor to make the final screening decision.</i></p> <p><i>You may not Screen In a CPS Report with a Response Time of Pending.</i></p>



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